

Data Migration Planning

Managing Information for Office 365

8-10-2015

Data Migration - Introduction

Universal Data Accessibility

With the County moving to Office 365 there is a need to have critical business data universally accessible to the staff that uses it.

From the Office 365 perspective this means in the Cloud either in OneDrive or SharePoint team sites

Data Migration - Planning

Office 365 online versions of the Word, Excel and PowerPoint products look to cloud based areas for files such as OneDrive and SharePoint and are unable to access files on either the computer desktop 'C' drive or local server based drives such as 'S', 'V' and 'U'.

The OneDrive for Business desktop agent coupled with the OneDrive cloud enables staff to move files from their 'C' and 'U' drives into the cloud. Once in OneDrive cloud the files can be used by the Office 365 online versions of Word, Excel and PowerPoint.

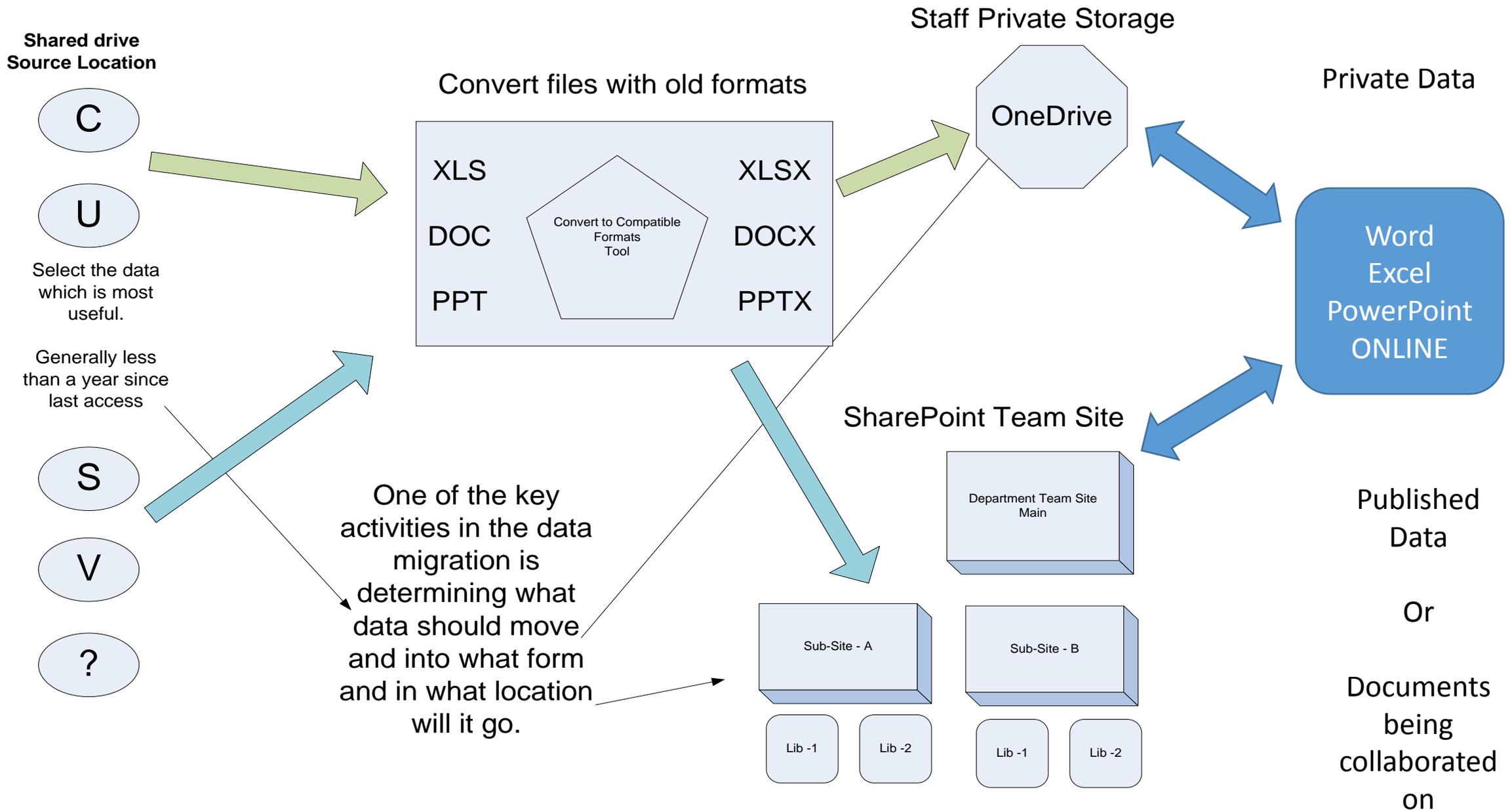
Using the SharePoint 2013 online version, DTS deploys team sites for each department. These team sites coupled with libraries and sub sites enables staff the those departments to create and manage the environments needed to reconcile the 'S' and 'V' drive files.

Having all data cloud based is helpful for any staff that may need to access a file from a remote location

Data Migration –SharePoint vs Shared Drives

- Data needs to be in the cloud to be universally accessible
- Potential compliance issues with public record legislation
- Data hard to find or inaccessible (need VPN access)
- No formal version control

Data Migration – Where data should be relocated



Data Migration –Roles

• Site Owner	Create	Read	Update	Delete	Admin
• Creator	Create	Read	Update		
• Editor	Read	Update			
• Viewer	Read				

Data Migration - Permissions

- Inherited
 - Can be synched with main site or sub site
 - Should use AD (email enabled) groups
- Separate
 - For special situation
 - Would use SharePoint permissions
- Determine those needed for Team Site members
 - Look at current 'S' drive AD security structure for ideas
 - Use security structures that work, revamp the members
 - Determine specific roles for contributors
 - Create data analysis (CRUD) diagram / site map

Data Migration - Information Management

- Using sub sites
 - If there are separate groups in the department which require their own restricted access
 - These sites do not need to be built out (just a place to hold libraries)
 - Sub-sites can inherit or have their own permissions
- Libraries within sites
 - Can be libraries or lists
 - If a library needs special metadata for all files it contains
 - If there are special permissions needed for access
- Determine which data is to be moved
 - Determine which data is needed the soonest (don't worry you can add more later)
 - Who are the contributors and what files do they work on (all internal, internal / external)
 - Published data and who accesses it (all, sub site, specific groups)

Definition:

Metadata is the structured knowledge
that we have about things we collect.

Data Migration – Metadata General Basic Questions

- What is it
- What is it called
- Who made it
- What is it about
- When was it made (how old)
- Who may use it
- What language is it in
- Who published it (or produced it)
- Where is it?
- How big is it
- What is it made of

Data Migration – **Minimum** – Metadata Effort

Users can perform basic searches and filtering

This minimum level should allow things to be incorporated meaningfully into a collection. Descriptions that meet this level can be discovered and used more readily than those things that are barely citable.

A minimum description would tell

- What kind of thing it is
- What it is called
- Where it is
- Who may use it

Data Migration – **Medium** – Metadata Effort

More advanced functions such as browse and group search results

This medium level allows the user more advanced options for discovery, browsing, sorting, etc. Elements in this level represent a level of detail some might not have for legacy collections. A medium description would tell more by adding to the minimum such information as

- More specifics about what kind of thing it is
- Some description of it
- What it is about (if applicable)
- What language it is in (if applicable)
- Links to images of it or recordings of it (if applicable)
- A unique machine-operable identifier

Data Migration – **Full** – Metadata Effort

Users can perform precise searches, sorting, etc.

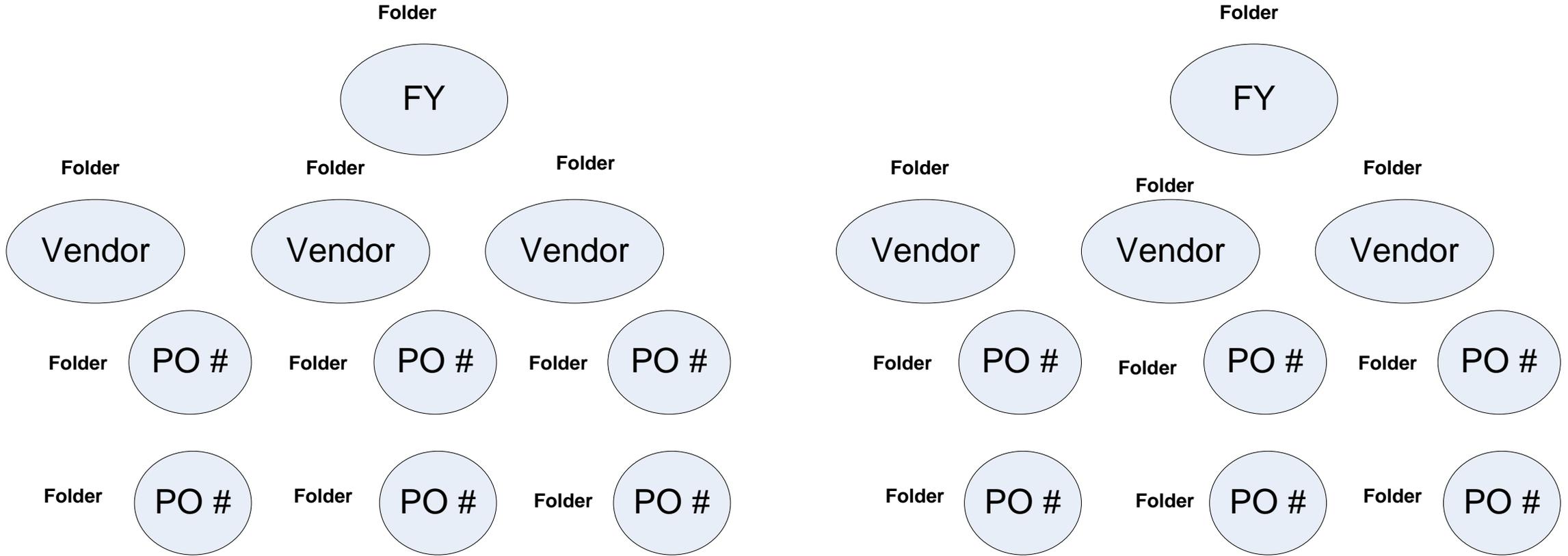
This full level allows users more functionality. Meeting this level allows the introduction of very precise searching capabilities across a wide variety of resources and allows a user to make a final evaluation as to whether the resource is relevant to his or her needs.

A full description would tell more by adding to the medium such information as

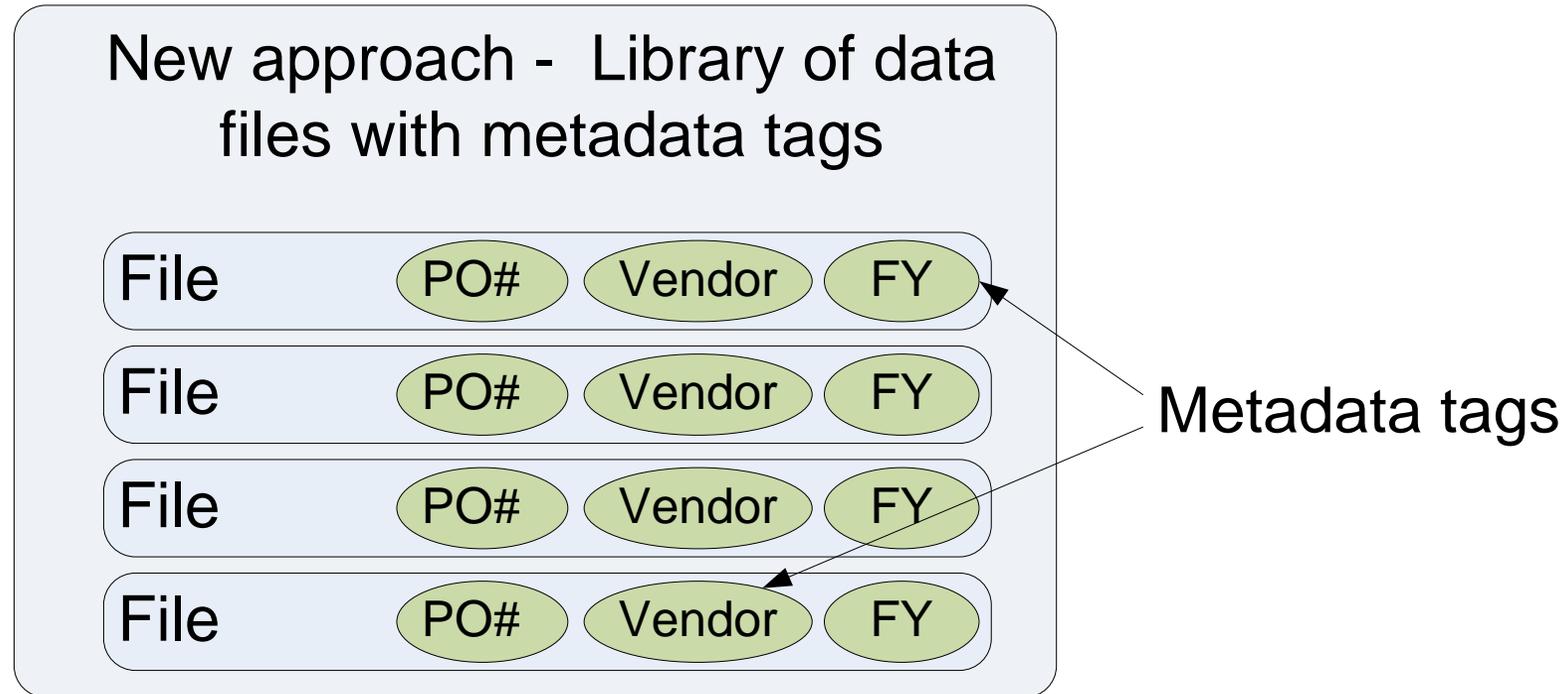
- What roles various people may have had with making it
- A detailed description of it
- An abstract or summary
- Its relationships with other things
- Precise terms or codes regarding what it is about

Data Migration – Improving file structures – AS IS

Old data model ('S' drive)



Data Migration – Improving file structures – TO BE



Can create / store views displaying different criteria such as 'all POs from Vendor x'

Data Migration – Moving files

- Unless G3 - Always convert
 - XLS – XLSX
 - DOC - DOCX
 - PPT – PPTX
- Move the most important / most frequently used first
 - Functional data owners need to determine
 - Can always move more later
- Can move files without adding metadata at first

Data Migration - Acceptable file type examples

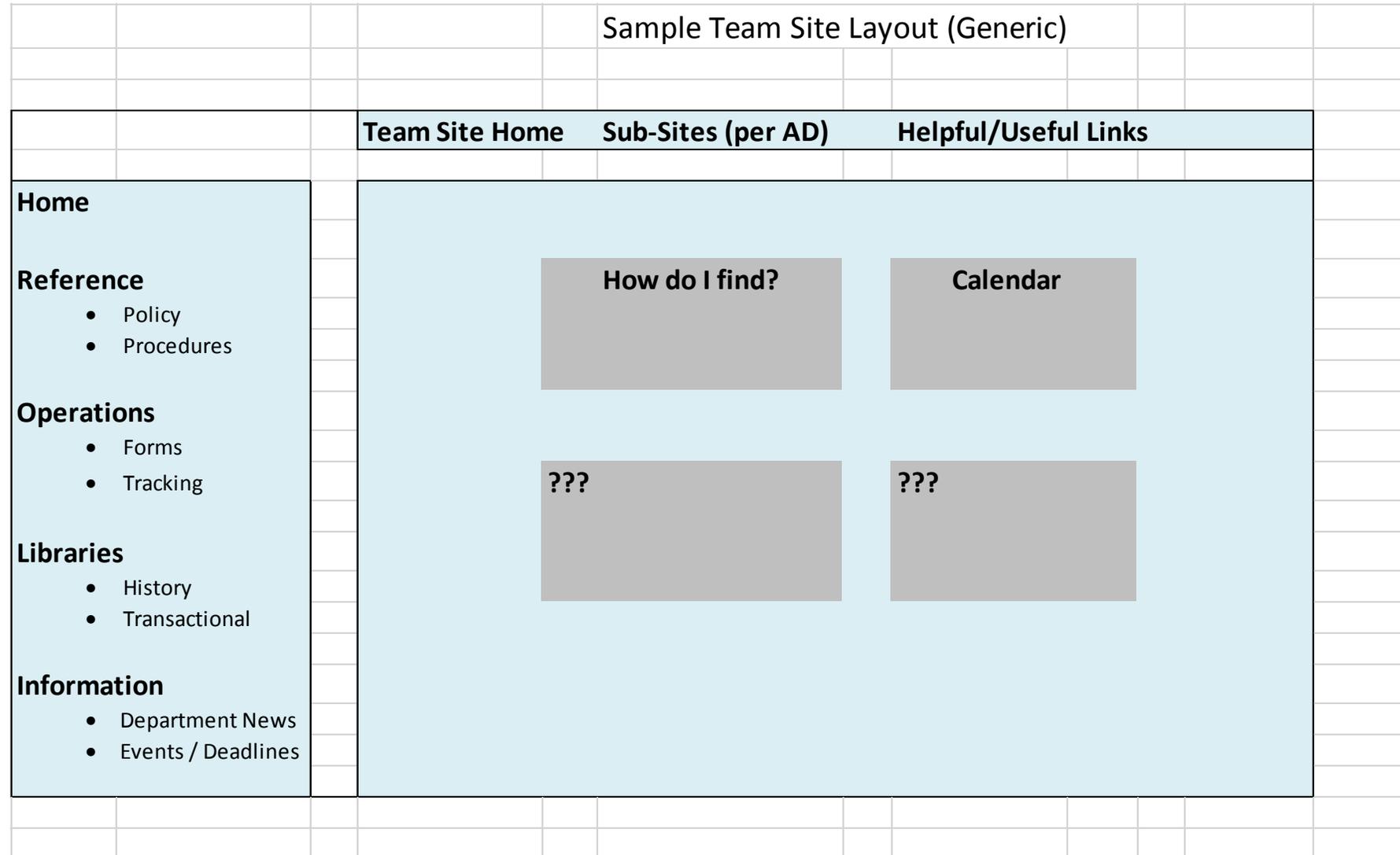
- Acceptable File Types
 - Recommended
 - XLSX PDF
 - DOCX (others)
 - PPTX
 - VSD
 - Not recommended
 - .WAV PST
 - .MOV Access DB
 - .MP4
 - Microsoft blocked

Data Migration – Take Aways

- Data needs to be in the cloud to be universally accessible
- Take the opportunity to ‘clean house’ on the ‘S’ drive
- Bring only the files you really need to operate
 - Can bring more over if you ever you need to
- Use the power of the search and views
- Use efficiency tools such as travel reimbursement

Reference

Data Migration – Team Site – Sample Layout



Microsoft Blocked 1 of 5

- .ade Microsoft Access project extension
- .adp Microsoft Access project
- .app Application file
- .asa ASP declarations file
- .ashx ASP.NET Web handler file.
- .asmx ASP.NET Web Services source file
- .asp Active Server Pages
- .bas Microsoft Visual Basic class module
- .bat Batch file
- .cdx Compound index
- .cer Certificate file
- .chm Compiled HTML Help file
- .class Java class file
- .cmd Windows NT command script
- .cnt Help Contents file
- .com Microsoft MS-DOS program
- .config Configuration file
- .cpl Control Panel extension
- .crt Security certificate
- .csh Script file
- .der DER Certificate file
- .dll Windows dynamic-link library
- .exe Program
- .fxp Microsoft Visual FoxPro compiled program

Microsoft Blocked 2 of 5

- .gadget Windows Gadget
- .grp SmarterMail group file
- .hlp Help file
- .hta HTML program
- .htr Script file
- .htw HTML document
- .ida Internet Information Services file
- .idc Internet database connector file
- .idq Internet data query file
- .ins Internet Naming Service
- .isp Internet Communication settings
- .its Internet Document Set file
- .jse JScript Encoded script file
- .json JavaScript Object Notation file
- .ksh Korn Shell script file
- .lnk Shortcut
- .mad Shortcut
- .maf Shortcut
- .mag Shortcut
- .mam Shortcut
- .maq Shortcut
- .mar Shortcut
- .mas Microsoft Access stored procedure
- .mat Shortcut

Microsoft Blocked 3 of 5

- .mau Shortcut
- .mav Shortcut
- .maw Shortcut
- .mcf Multimedia Container Format
- .mda Microsoft Access add-in program
- .mdb Microsoft Access program
- .mde Microsoft Access MDE database
- .mdt Microsoft Access data file
- .mdw Microsoft Access workgroup
- .mdz Microsoft Access wizard program
- .ms-one-stub Microsoft OneNote stub
- .msc Microsoft Common Console document
- .msh Microsoft Agent script helper
- .msh1 Microsoft Agent script helper
- .msh1xml Microsoft Agent script helper
- .msh2 Microsoft Agent script helper
- .msh2xml Microsoft Agent script helper
- .mshxml Microsoft Agent script helper
- .msi Windows Installer package
- .msp Windows Installer update package file
- .mst Visual Test source files
- .ops Microsoft Office profile settings file
- .pcd Photo CD image or Visual Test compiled script
- .pif Shortcut to MS-DOS program

Microsoft Blocked 4 of 5

- .pl Perl script
- .prf System file
- .prg Program source file
- .printer Printer file
- .ps1 Windows PowerShell Cmdlet file
- .ps1xml Windows PowerShell Display config file
- .ps2 Windows PowerShell Cmdlet file
- .ps2xml Windows PowerShell Display config file
- .psc1 Windows PowerShell Console file
- .psc2 Windows PowerShell Console file
- .pst Microsoft Outlook personal folder file
- .reg Registration entries
- .rem ACT! database maintenance file
- .scf Windows Explorer command file
- .scr Screen saver
- .sct Script file
- .shb Windows shortcut
- .shs Shell Scrap object
- .shtm HTML file that contains server-side directives
- .shtml HTML file that contains server-side directives
- .soap Simple Object Access Protocol file
- .stm HTML file that contains server-side directives
- .svc Windows Comms Foundation (WCF) service file
- .url Uniform Resource Locator (Internet shortcut)

Microsoft Blocked 5 of 5

- .vb Microsoft Visual Basic Scripting Edition file
- .vbe VBScript Encoded Script file
- .vbs VBScript file
- .vsix Visual Studio Extension
- .ws Windows Script file
- .wsc Windows Script Component
- .wsf Windows Script file
- .wsh Windows Script Host settings file
- .xamlx Visual Studio Workflow service file

Make the leap

